

STUDENT AID AWARENESS WORK TEAM AGENDA

March 8, 2001–10:00-2:00

DESIRED OUTCOMES-

- Understanding of status of quick hits
- List any requests of Joe for how we want him to sort specific information
- Understanding of input received from customer data gathering and implications for long-term direction and short-term objectives
- Agreement on long-term 2004 direction for SAA
- Agreement on short-term 2001 objectives for SAA
- Agreement on 2001 functional objectives, including–key project initiatives, deliverables, and suggestions for leaders
- Agreement on how we will brief our sponsor, Jennifer, and get approval
- Preview of Roles and Responsibilities phase
- Agreement on next steps
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<u>WHAT</u>	<u>HOW</u>	<u>WHO</u>	<u>WHEN</u>
START-UP-	<ul style="list-style-type: none">• Next steps and +/- from last time• Review where we are on process road map• Desired Outcomes• Agenda	Nancy	10:00-10:15
QUICK HITS STATUS	<ul style="list-style-type: none">• Status report–look at each item from our agreed upon Quick Hits (See file “Minutes SAA Work Team 2-06-01”) and, for each, report out whether they have been completed• Determine who will write up a summary report to deliver to Jennifer	Bill Nancy	10:15-10:30
SORTING RESEARCH INFORMATION	<ul style="list-style-type: none">• List any requests of Joe for additional sorting of research information	Nancy	10:30-10:45
CUSTOMER INPUT	<ul style="list-style-type: none">• Review summary• Check for understanding• List implications for additions/changes to initial long-term direction brainstorm list• List any suggestions for short-term objectives	Bill, Hazel, Linda	10:45-11:00

LONG-TERM, 2004 DIRECTION	<ul style="list-style-type: none"> • Review initial brainstorm list • Check for understanding • Add any additional items • Check against our vision of success • Narrow the list– <ul style="list-style-type: none"> • Combine any obvious duplicates • Advocate • Prioritize • Check against our vision of success • Agree on long-term direction • Agree on how we want it written up & who will do it 	Nancy	11:00-11:30
SHORT-TERM, 2001 OBJECTIVES	<ul style="list-style-type: none"> • Review agreed upon deliverable in our charter • Brainstorm short-term, 2001 objectives • Narrow the list– <ul style="list-style-type: none"> • Combine any obvious duplicates • Advocate • Prioritize, checking against our vision of success and any input from customers or key stakeholders • Agree on short-term objectives • Determine project initiatives based on short-term objectives • List, discuss, and agree on deliverables for each project • Suggest leader for each project • Agree on how this will be written up and who will do so 	Nancy	11:30-12:30
FUNCTIONAL SHORT-TERM, 2001 OBJECTIVES	<ul style="list-style-type: none"> • Assign each functional area to an individual & have that individual do a first draft on a flip chart of functional objectives & key project initiatives • Share each list and get any changes/additions from team • Check these against the SAA short-term objectives, vision of success, and stakeholder input • Agree on functional short-term objectives & key project initiatives • Discuss & agree on deliverables for 	Nancy	12:30-1:30

	each project <ul style="list-style-type: none"> • Suggest who should lead each initiative 		
APPROVAL OF SPONSOR	<ul style="list-style-type: none"> • Make suggestions for how to present the long-term direction, short-term objectives, and functional objectives to Jennifer • Discuss • Agree 	Nancy	1:30-1:40
PREPARING FOR ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • Review initial thoughts of how to proceed with this phase • Check for understanding & suggestions • Determine any pre-work before our next meeting 	Kristine	1:40-1:50
CLOSE-	<ul style="list-style-type: none"> • Next Steps • +/- 	Nancy	1:50-2:00

EACH PERSON HAVE ON HAND AT THE MEETING-

- Charter
- Process road map
- Minutes SAA Work Team 2-06-01 that lists the Quick Hits
- Minutes SAA Work Team 2-22-01 that lists initial brainstorm list of long-term direction
- Any data that has been handed out that you may want to refer to in developing the long-term, short-term, and functional priorities